



NFL on Local TV Stations = Hometown Advantage

— Viewers overwhelmingly choose to watch Home-team NFL Games on Broadcast TV stations over ESPN and NFLN Cable Nets —

What has more local appeal than watching your hometown NFL team on your hometown TV Station? Given the option to watch their NFL home team on broadcast TV or cable, football fans overwhelmingly chose their local TV station during the 2012 regular football season.

When cable networks ESPN and NFLN host a nationwide presentation of an NFL football game, they are required to provide a live feed of that game to each team’s respective local broadcast TV station partner. Local market simulcasts of home-team NFL games occurred 60 times during the 2012 regular season. Local TV stations attracted as much as 4.5 times the game day household viewers compared with the cable networks that televised the game at the same time.

In the 30 markets where a regular season game was simultaneously offered on both a local TV station and one of the cable nets, **the average household broadcast rating exceeded the cable network rating by 74%.**

The top 5 markets where NFL household ratings on local broadcast TV stations exceeded simulcast games on the cable networks were: Milwaukee (351% higher TV station ratings than cable), Minneapolis (+261%), Cleveland (+212%), New Orleans (+212%) and St. Louis (+211%).

The 2013 Super Bowl teams were also favored during the season on their local broadcast TV stations, ranking 6th and 13th in the analysis.

The data tells the story — football may be a national sport, but it is first and foremost a local passion.

Team	Market	# Games	Broadcast HH Rating	Cable HH Rating	INDEX
Green Bay Packers	Milwaukee	2	43.0	9.5	451
Minnesota Vikings	Minneapolis-St. Paul	1	24.2	6.7	361
Cleveland Browns	Cleveland-Akron (Canton)	1	22.8	7.3	312
New Orleans Saints	New Orleans	2	40.2	12.9	312
St. Louis Rams	St. Louis	1	19.9	6.4	311
Baltimore Ravens	Baltimore	2	30.6	10.0	306
Indianapolis Colts	Indianapolis	1	26.0	8.5	306
Cincinnati Bengals	Cincinnati	2	20.4	7.6	268
Pittsburgh Steelers	Pittsburgh	2	30.1	11.6	259
Carolina Panthers	Charlotte	2	16.9	7.6	222
New England Patriots	Boston (Manchester)	1	25.6	13.5	190
Detroit Lions	Detroit	2	14.6	7.7	190
San Francisco 49ers	San Francisco-Oak-San Jose	3	11.5	6.2	184
Houston Texans	Houston	2	22.2	12.5	178
Denver Broncos	Denver	3	24.6	13.9	177
San Diego Chargers	San Diego	3	20.7	12.9	160
Jacksonville Jaguars	Jacksonville	1	10.1	6.4	158
Kansas City Chief	Kansas City	2	17.4	11.7	149
Atlanta Falcons	Atlanta	3	17.2	11.9	145
Tennessee Titans	Nashville	2	14.8	10.3	144
Oakland Raiders	San Francisco-Oak-San Jose	2	7.9	5.5	144
Seattle Seahawks	Seattle-Tacoma	2	17.5	13.6	129
Buffalo Bills	Buffalo	1	17.2	13.9	124
Arizona Cardinals	Phoenix (Prescott)	2	11.6	9.5	122
Philadelphia Eagles	Philadelphia	3	12.7	10.4	122
Miami Dolphins	Miami-Ft. Lauderdale	1	6.6	5.7	116
Chicago Bears	Chicago	4	15.0	14.3	105
Tampa Bay Buccaneers	Tampa-St. Pete (Sarasota)	1	6.5	7.1	92
Dallas Cowboys	Dallas-Ft. Worth	1	12.3	13.8	89
New York Giants	New York	2	6.2	10.2	61
Washington Redskins	Washington DC (Hagerstown)	1	10.3	20.9	49
New York Jets	New York	2	4.1	8.8	47
In-Market Average:			18.3	10.5	174

Source: TVB analysis of Nielsen Media Research data. 30 games aired on ESPN & NFLN between 9/10 and 12/22/2012. Each game aired on one of the two cable networks and was simulcast on a broadcast station. The analysis compares the in-market delivery of the cable network and broadcast station in each respective market. Teams playing more than 1 game (i.e. the Chicago Bears played 3 games on ESPN and 1 game on NFLN) saw the deliveries averaged together.